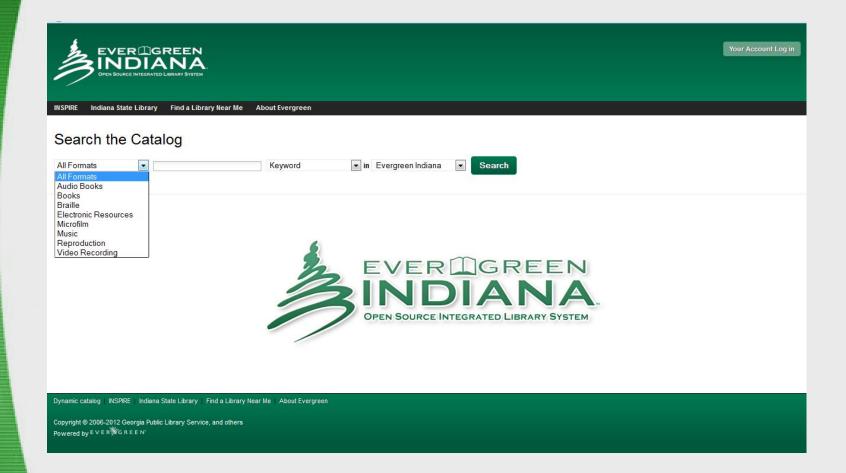
# Evergreen 2012 Circulation Class and Roundtable

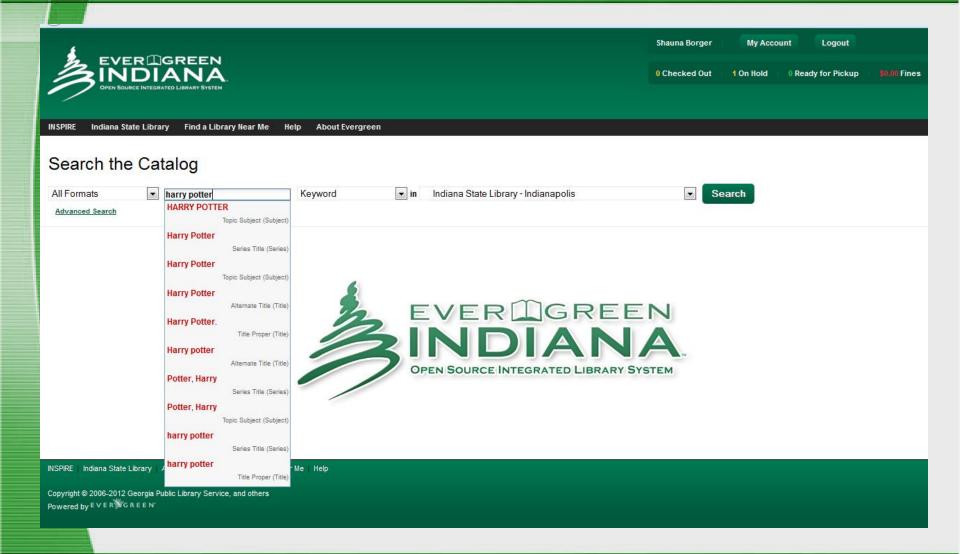
Shauna Borger

Evergreen Indiana Coordinator

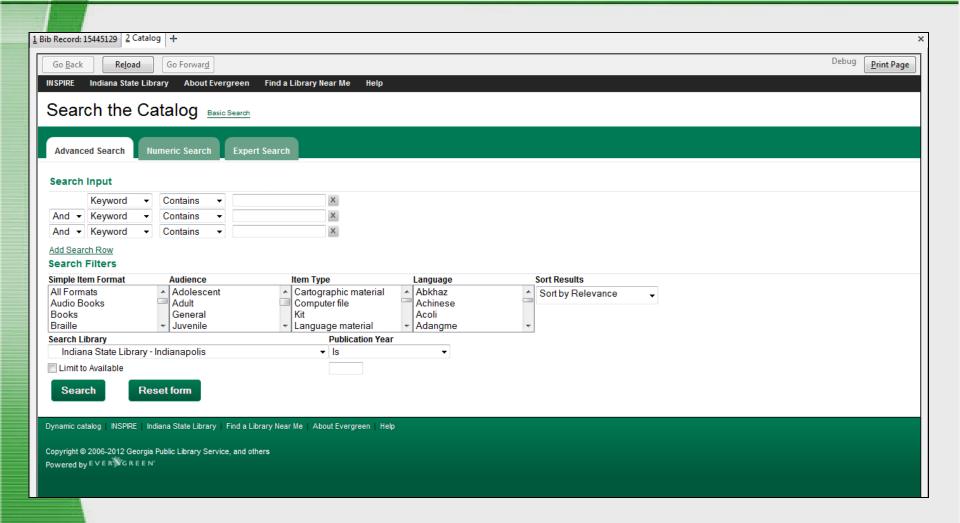
#### New OPAC interface



#### OPAC

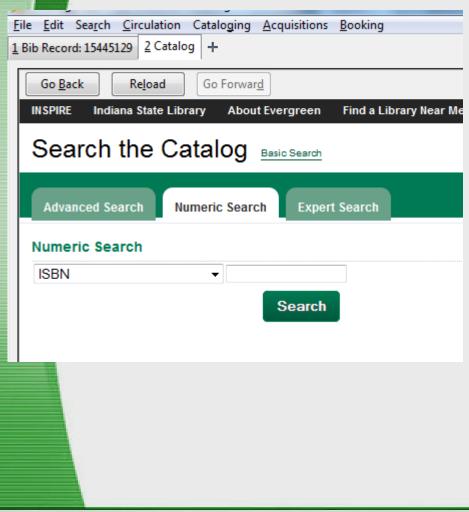


#### OPAC - Advanced Search



## OPAC – Numeric and Expert Search

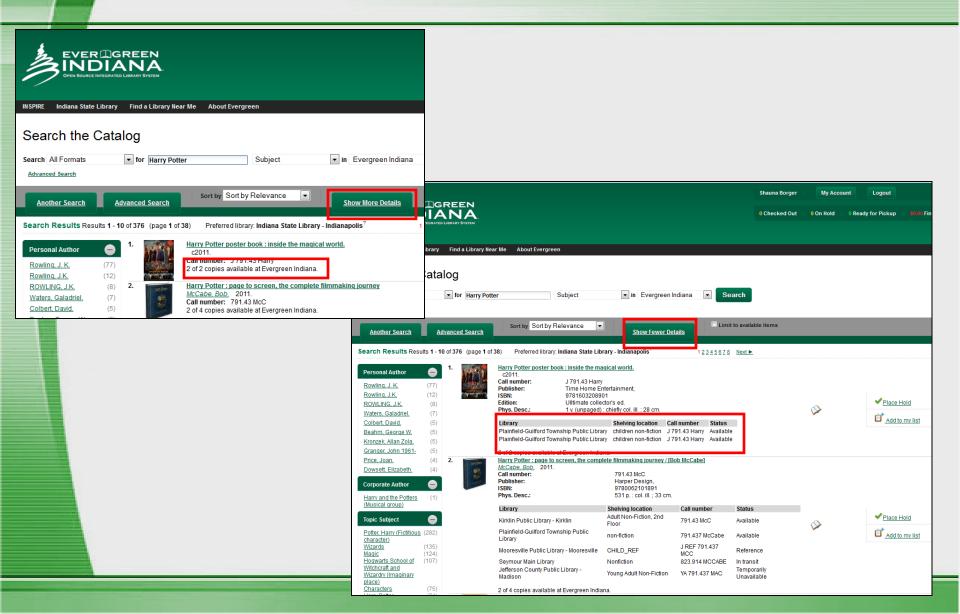
#### **Numeric Search**



#### **Expert Search**

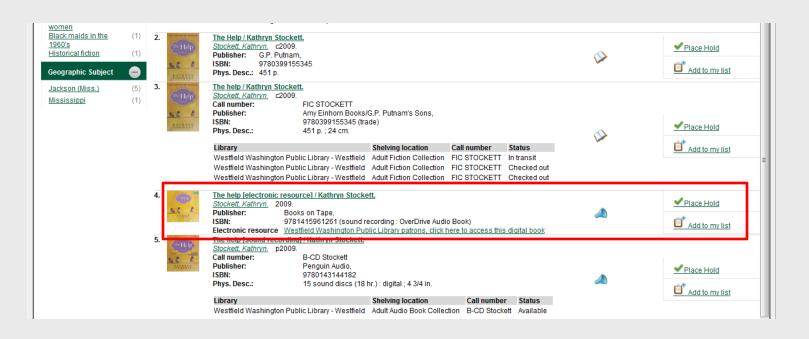
<u>F</u> ile <u>E</u> dit Sea <u>r</u> ch <u>C</u>	irculation Catalogi	ng <u>A</u> cquisitions	<u>B</u> ooking					
1 Bib Record: 15445129	2 Catalog +							
Go <u>B</u> ack	Reload Go For	war <u>d</u>						
INSPIRE Indiana	a State Library A	bout Evergreen	Find a Library Near Me					
Search t	Search the Catalog Basic Search							
Advanced Search Numeric Search Expert Search								
Expert Search								
Tag:	Subfield:	Value:	X					
[Add row]	Search							

### OPAC - See More Details

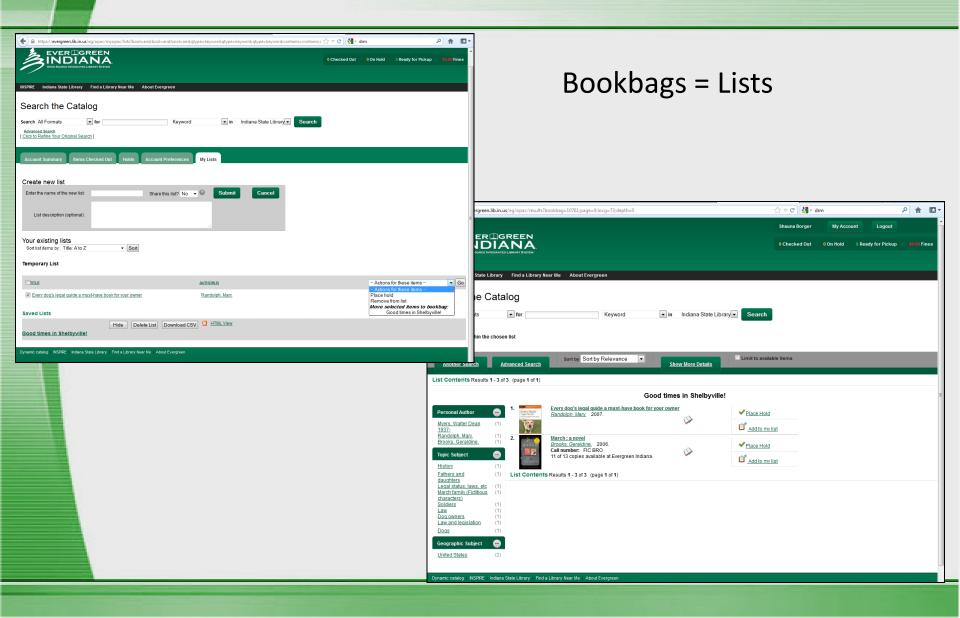


#### OPAC

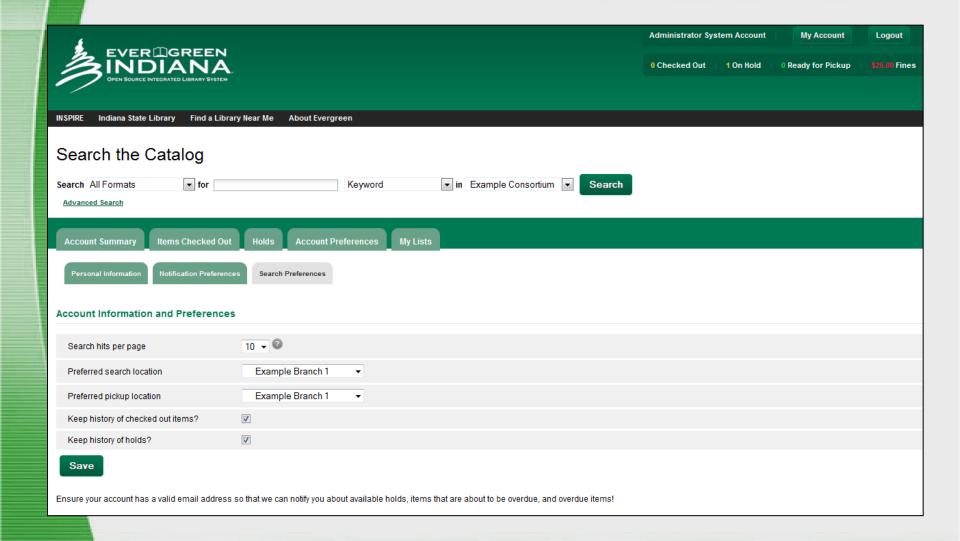
## Records without holdings do not appear with a grey background any longer.



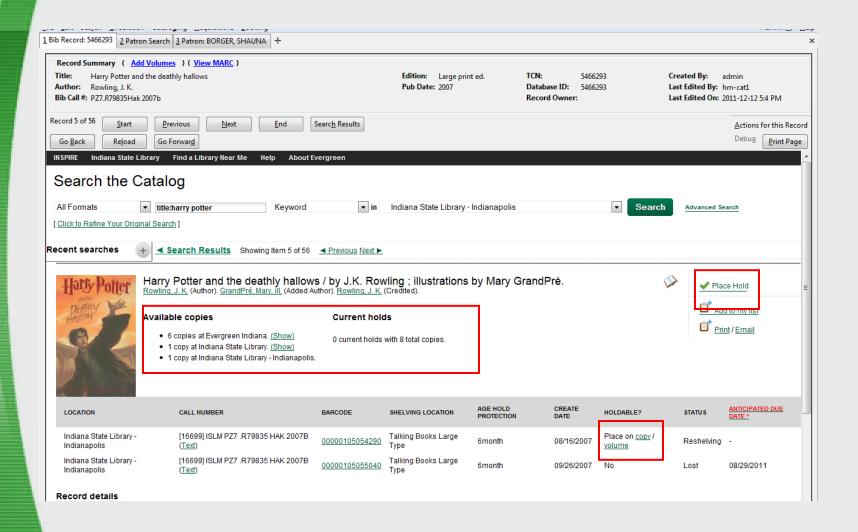
#### **OPAC - Lists**



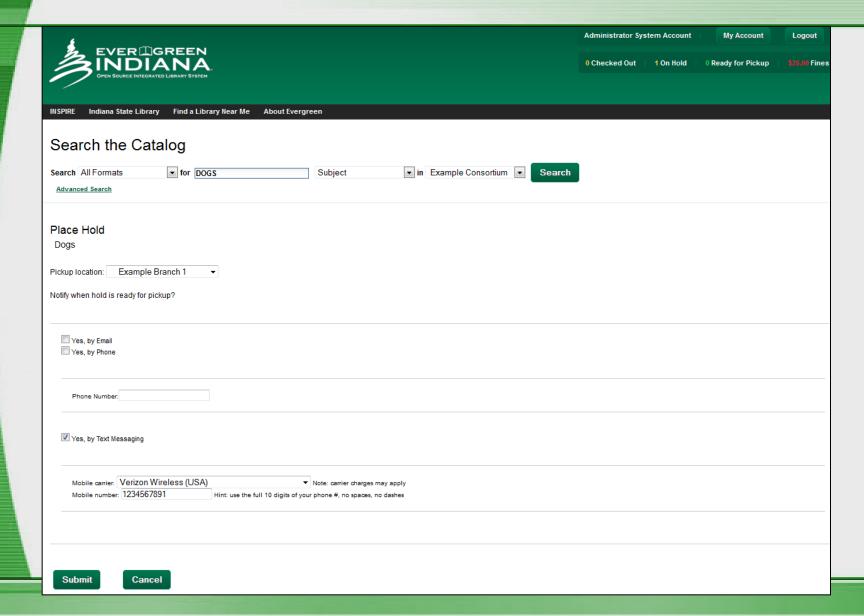
### OPAC – Patron Search Preferences



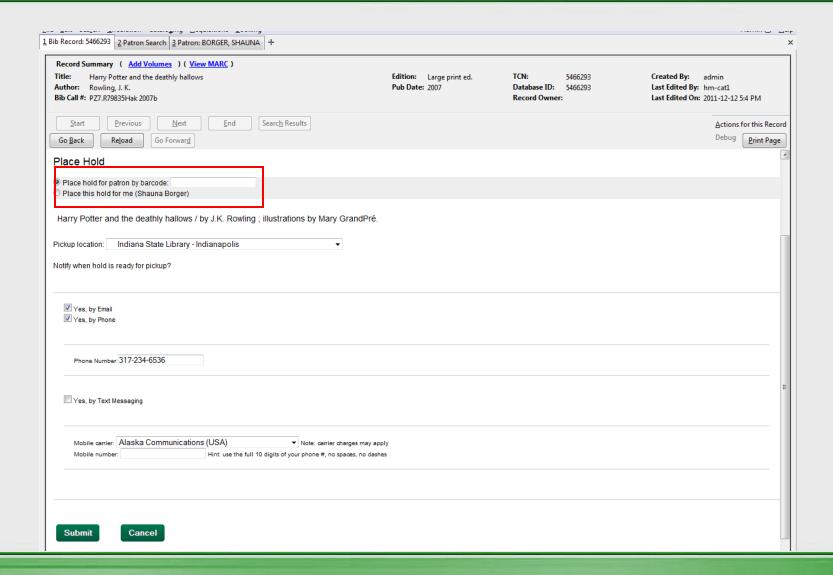
### Holds in Staff Client



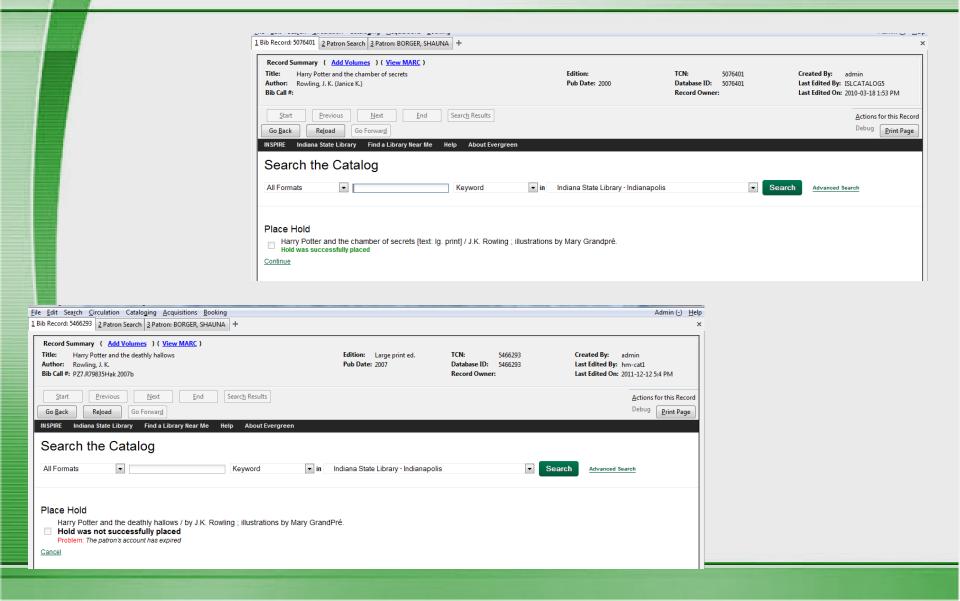
## Placing a hold in OPAC



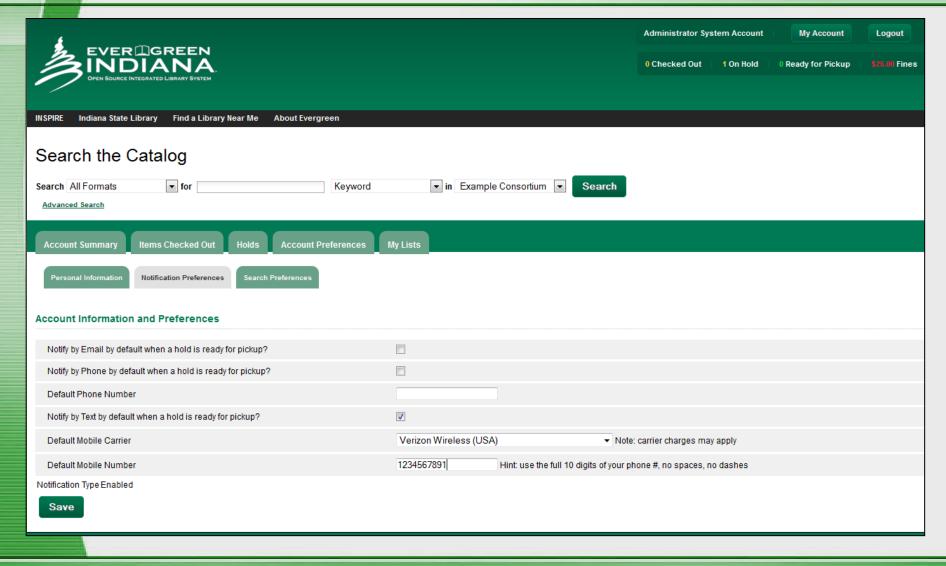
## Placing a hold in Staff Client



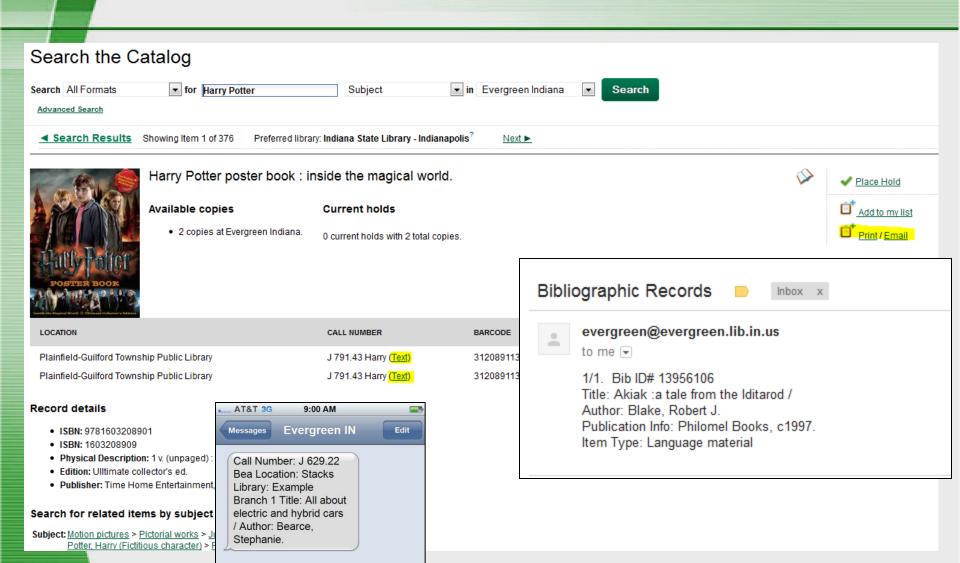
#### Holds in Staff Client



# OPAC – Patron notification preferences

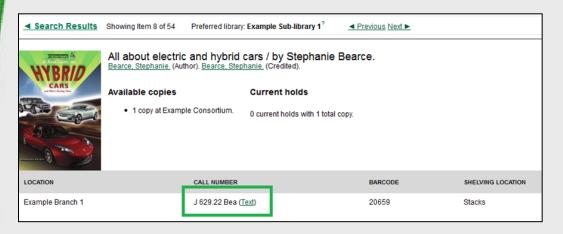


#### OPAC - Item Info



#### OPAC - Hold Notifications

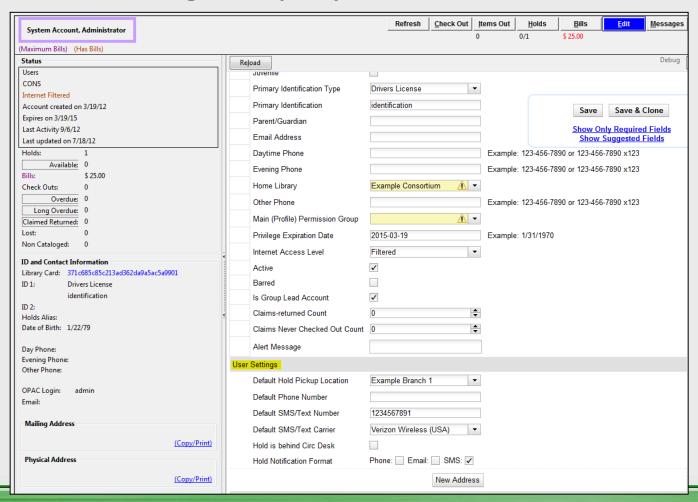
SMS (Text) Notifications





#### **OPAC / Circulation**

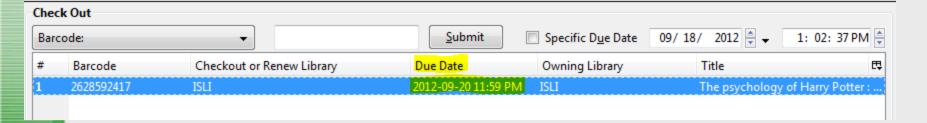
User Settings display in the staff client



#### Circulation

Due date shortens to reflect patron library card expiration date

Home Library	West Lafayette Public Lib	
Main (Profile) Permission Group	PLAC 🔻	
Privilege Expiration Date	2012-09-20	Example: 1970-01-31

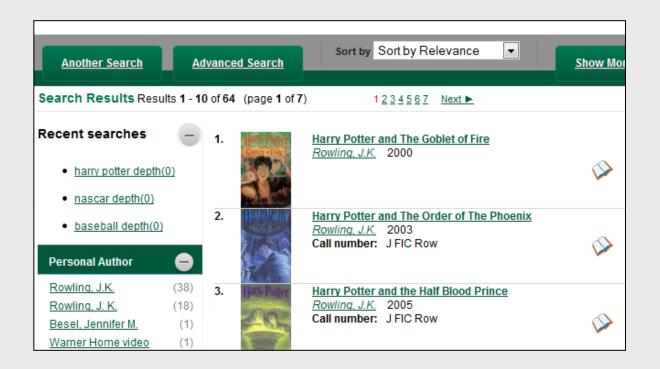


#### Circulation

- Option for patrons and staff to place holds on age protected items.
  - If they place a hold, a dialog box informs them that "Problem: All available copies are temporarily unavailable at your pickup library. Placing this hold could result in longer wait times."
  - Patron/staff gets the option to place the hold or cancel.

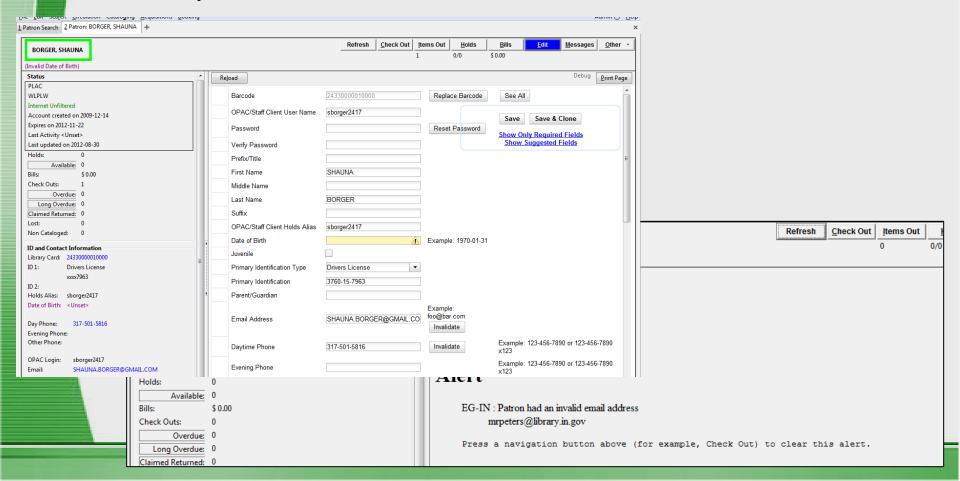
# Evergreen 2.2 Enhancements – Circulation

View recent staff catalog searches



# Evergreen 2.2 Enhancements — Circulation

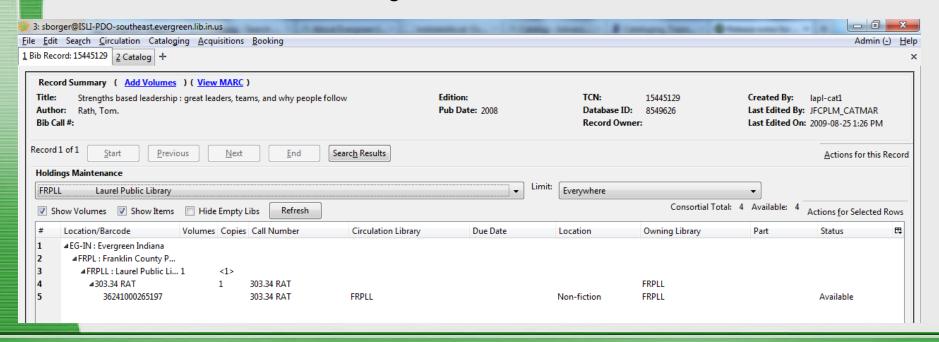
- Required patron registration fields
- Mark phone and email address invalid



#### Cataloging

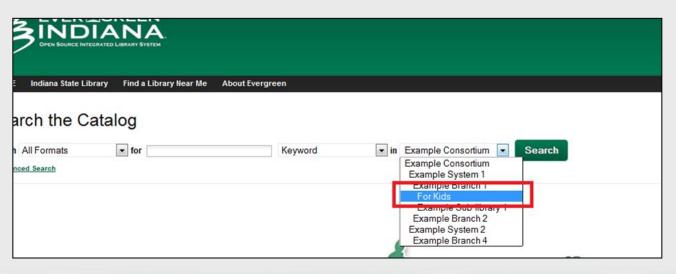
#### Holdings Maintenance screen

- Can view one library system at a time.
- •Check Show Volumes and/or Show Items to always display that information. Click on Refresh to apply.
- •Libraries shown in the list with a green box next to their name have the title in their collection.
- •Click on Search Results to go back to the search results screen.



Local Administration > Copy Location

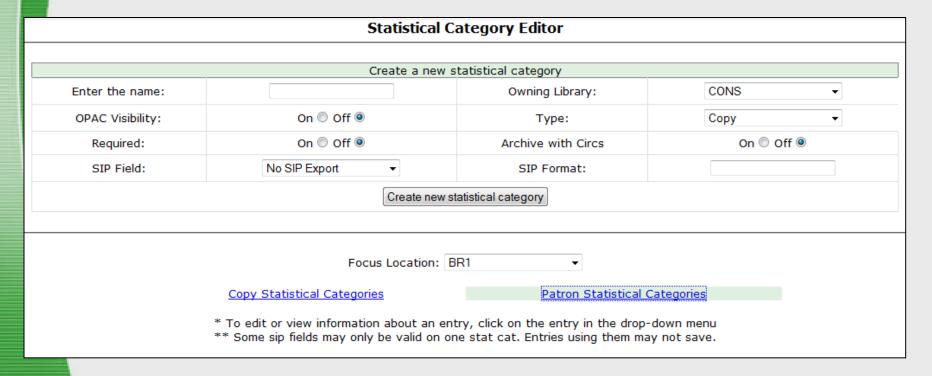
Copy Location Groups BR1	▼			
Location Groups  New  1. For Kids [ Visible Edit Delete ] ^ ^ ^	Group Entries CONS Children's DVDs CONS Children's Fiction CONS Children's Non-Fiction	Remove →	Copy Locations  CONS Invisible CONS Stacks BR1 Migrated Items With No Legacy Location	
			J.v. imgrate items viiii to Esgaty Essation	



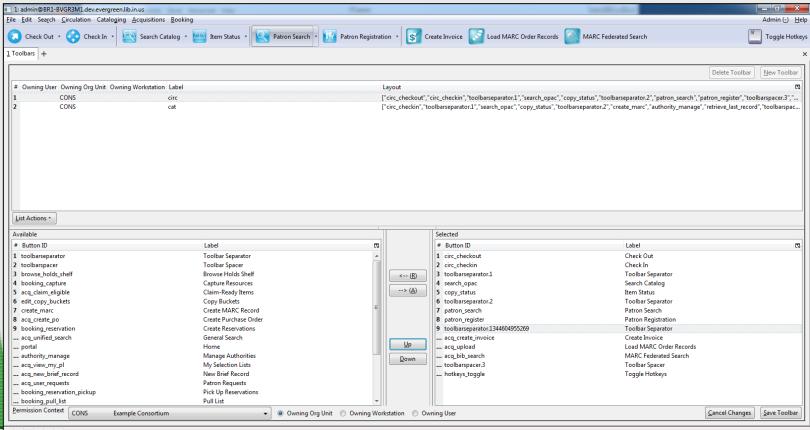
 Local Admin > Copy Locations Editor > Checkin Alert

Create a new copy location						
Name:		Holdable:	Yes ◎ No ◎			
OPAC Visible:	Yes ◎ No ⑨	Circulate:	Yes ◎ No ◎			
Hold Verify:	Yes ◎ No ⑨	Owning Library	CONS ▼			
Checkin Alert:	Yes   No					
Label prefix:		Label suffix:				

Local Administration > Statistical Categories
 Editor



 Workstation Administration > Toolbars > Configure Toolbars



- Our patron borrowed a book from another library, checked it out at our home library and then lost it. What do I do?
  - You need to contact the owning library to have them mark the item Lost.
  - Use the Circulation Support Contact List available on the Staff Training Documents website to find contact name and information.

- What fines and fees can we accept at our library?
  - If you are the Circulating Library, you can accept Overdue fines.
  - If you are the Owning Library, you can accept Lost and Damaged Fines.
  - If your library created the billing, you can accept Miscellaneous Fines.

- How do I identify what type of billing it is and to which library the payment is owed?
  - Make sure you have the following columns displaying in the Billing screen: Type,
    Checkout/Renew Library, Owning Library,
    Status. Save the columns by going to List Action > Column Configuration.

<u>B</u> ill l	Bill Patron History Red Items are still Checked Out Actions for Selected Transactions									
	Balance Owed	Bill#	Start	Total Billed	Total	Туре	Checkout or Renew Library	Owning Library	Status	Payment Pen
~	10.00	98136	2010	10.00	0.00	grocery				0.00
~	10.00	41181	2009	10.00	0.00	circulation	JCPLS	JCPLS	Discard/Weed	0.00
~	10.00	41181	2009	10.00	0.00	circulation	JCPLS	JCPLS	Checked out	0.00
-	10.00	41181	2009	10.00	0.00	circulation	JCPLS	JCPLS	Discard/Weed	0.00
~	3.00	41181	2009	3.00	0.00	circulation	JCPLS	JCPLS	Discard/Weed	0.00
~	3.00	41181	2009	3.00	0.00	circulation	JCPLS	JCPLS	Available	0.00
~	.50	39840	2009	.50	0.00	circulation	JCPLS	JCPLS	Available	0.00
~	.50	39840	2009	.50	0.00	circulation	JCPLS	JCPLS	Available	I 0.00
~	.50	39840	2009	.50	0.00	circulation	JCPLS	JCPLS	Lost	0.00
~	.50	39840	2009	.50	0.00	circulation	JCPLS	JCPLS	Lost	0.00
~	.50	39840	2009	.50	0.00	circulation	JCPLS	JCPLS	Discard/Weed	0.00

- Type: Miscellaneous or Circulation
- Checkout/Renew Library: Library owed the Overdue Fee.
- Owning Library: Library owed the Lost or Damaged Fee.
- Status: Available, Reshelving, Lost, etc.
- If you have a question about any of the billings, right-click on the billing and choose Full Details.